PREVIOUS CLIENT

HubSpot Adoption Scorecard

About HubSpot Enterprise Edition

ABOUT YOUR HUBSPOT EDITION

Your Plan

If you have any questions about this information, please contact your HubSpot Account Manager.
Click here to see the HubSpot Customer Terms of Service
Click here to download the HubSpot Security and Risk Overview

Your Packages

Marketing Enterprise (20,000 Contacts) + Reporting, Ads, Sites
CRM

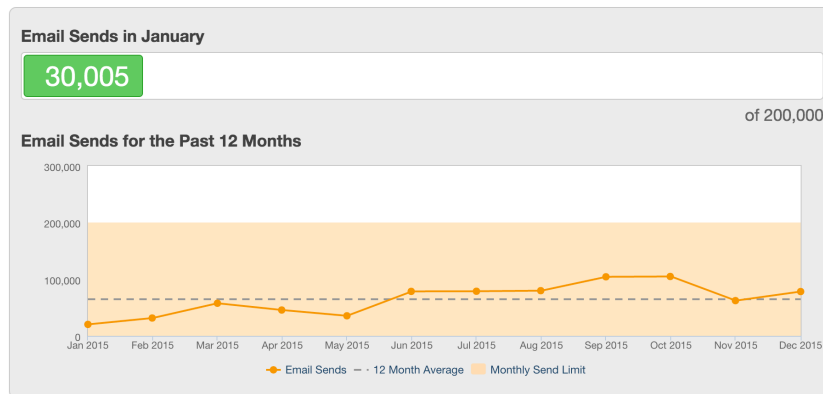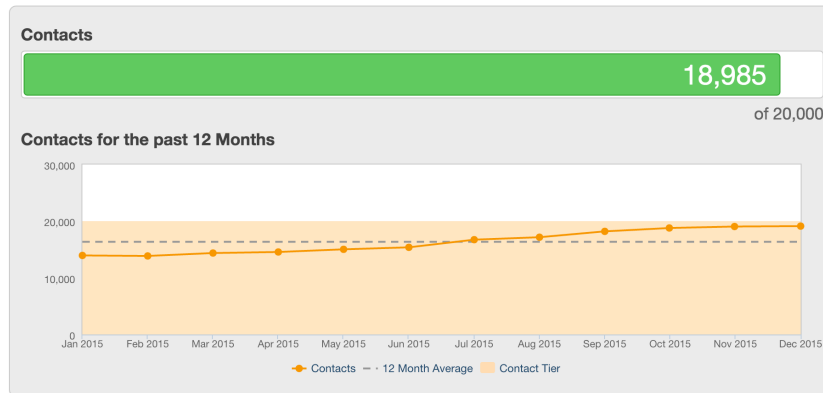**Total Contacts**
18,985 of 20,000 total contacts

Emails
30,005 of 200,000 emails sent this month

Consideration:
Previous client only has a little over 1,000 contacts left before they will incur an extra fee upon HubSpot contract renewal for contact overage.
• Consider slowly dripping out double opt-in campaigns to bucket contacts into personas
• Always validate new email addresses from form capture with a nurturing workflow
• Remove contacts that have hard bounced or unsubscribed from email marketing campaigns

Contacts

18,985

of 20,000

Contacts for the past 12 Months

Legend: Contacts — 12 Month Average — Contact Tier

Email Sends in January

30,005

of 200,000

Email Sends for the Past 12 Months

Legend: Email Sends — 12 Month Average — Monthly Send Limit

HubSpot ROI Scorecard

SCORECARD ASSESSMENT RESULTS

Category	HubSpot Enterprise Features	Points	Total Points Possible	Effectiveness Score
Inbound Marketing Foundation	1. Buyer Personas	3	4	75%
	2. Site Pages	2	4	50%
	3. Keywords	2	4	50%
	4. Blog	1	4	25%
Conversion Path	5. Calls to Action	2	4	50%
	6. Landing Pages	1	4	25%
	7. Forms	1	4	25%
	8. Thank You Pages	1	4	25%
	9. Offers	1	4	25%
	10. Workflows	1	4	25%
Reporting/Measurement	11. Campaigns	2	4	50%
	12. Lead Scoring	4	4	100%
	13. Page Performance	1	4	25%
	14. Competitors	2	4	50%
Essential HubSpot Tools	15. Social Media	1	4	25%
	16. Email Marketing	1	4	25%
	17. Content Calendar	1	4	25%
	18. Smart Content	2	4	50%
	19. HubSpot CRM	4	4	100%
	20. HubSpot System Organization	1	4	25%
			Total Effectiveness Average	**41%**

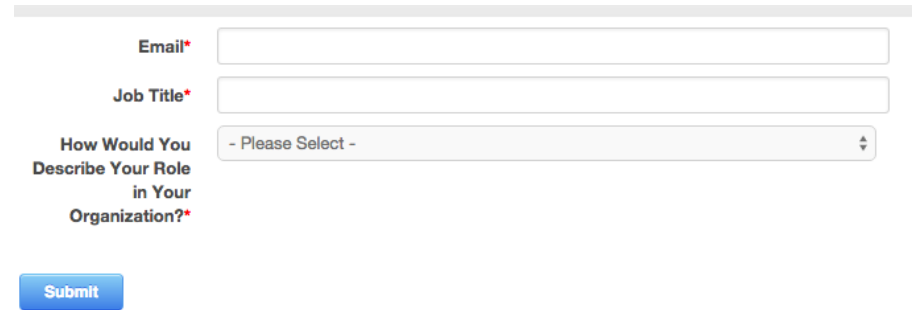# Breakdown of HubSpot ROI Scorecard Results

Scorecard Notes
- Persona segmentation used very rarely on content download forms. Most used form, Partner Inquiry, does not have a persona question associated with it
- Progressive profiling used very rarely on forms
- Several questions ask for seemingly repetitive information (ex: SDMA Download asks only for email, Job Title and then role in the organization, which many people would see as repetitive)

Best Practices
- Well-designed forms collect information about prospects. Using the right forms will allow to continuously gather information to nurture and segment leads
- Form length and intensity of questions should be equivalent to prospect's perceived value of offer being received
- Download forms should include a qualifying question to bucket visitor into a persona
- All HubSpot forms must include email field in order for a contact to be created and tracked within HubSpot

Opportunities
- Use smart form fields and progressive profiling to ask new questions to returning prospects to build their HubSpot profile
- Add a persona qualifying question to all offer forms to begin to segment visitors into personas automatically as opposed to manually

Email*	
Job Title*	
How Would You Describe Your Role in Your Organization?*	- Please Select -

Submit

Scorecard Notes
- Some thank you pages simply say thank you and do not offer the visitor any options to click further into the site
- Site navigation is not re-introduced on thank you pages to allow visitors to move more deeply into the site
- Thank you page simply says that we'll get back to you soon; does not give visitor any timeline to expect to be contacted

Best Practices
- Every landing page should be followed with a thank you page to engage new leads. Strategically designed thank you pages should help qualify leads, decrease bounce rate, and keep leads engaged by show opportunities to click back to content and site pages that align with the audience persona

Opportunities
- Build thank you pages out with blog posts that relate to the content, demo, service, or product the visitor just signed up for to bring them deeper into the site
- For demos/consultations/services, because you do not need to deliver the content via email, develop a personalized, automated thank you email to touch the lead another time as well as to validate the email address
- For demos/consultations/services, give an exact timeline that they should expect to hear from Previous Client

Scorecard Notes
- 29 workflows live
- 18,981 total contacts, 1 active contact in workflows
- Very few workflows associated with content downloaded or lead nurturing

Best Practices
- Effectively scale marketing efforts and save time by implementing successful marketing automation in order to nurture interested contacts and drive them deeper into the decision funnel over time

Opportunities
- Support lead nurturing for leads to MQLs and SQLs by expanding workflow automation with additional offers and resources
- Include lead nurturing workflows in all conversion paths, regardless of lifecycle stage
- Include decision-stage CTAs for case studies, request consultation, etc. in email nurturing campaigns

2016 Web Lead Notific... ● Standard	13	0	Dec 11 2015	suzanne car...
Downloaded ebook ○ Standard	0	0	Dec 4 2015	suzanne car...
Change to Platform Par... ● Standard	37	0	Dec 2 2015	Liz Mackenzie
Change to Former Clients ● Standard	478	0	Dec 2 2015	Liz Mackenzie
Change to Leads ● Standard	582	0	Dec 2 2015	Liz Mackenzie
User Type Update ● Standard	7,715	1	Dec 2 2015	Liz Mackenzie
Old Customers Marked ... ● Standard	312	0	Dec 1 2015	Liz Mackenzie

Scorecard Notes
- Manual lead scoring is set up
- Predictive lead scoring is set up; model has not been updated since Sept. 2015
- Lead scoring is integrated well with HubSpot CRM

Best Practices
- Identify qualification criteria for online marketing assets
- Determine point values
- Help determine what makes a sales-ready lead
- Pass qualified leads on to sales

Opportunities
- Consider coming back to the predictive lead scoring model, analyzing the insights, and deciding whether the model needs to be updated as the organization has developed
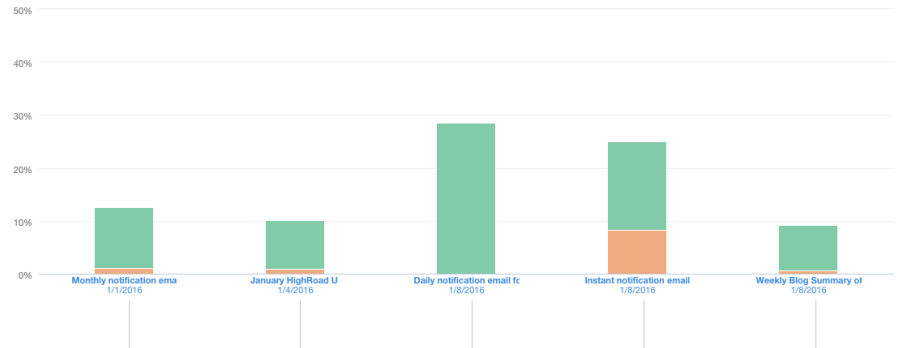
Scorecard Notes
- 13% open rate on emails sent
- 1.4% click rate
- 50 unsubscribes in last 5 emails sent
- Only 9 automated emails have been set up in system and are not being utilized to their full extent

Best Practices
- Sending targeted emails based on interest, behavior and stage of your prospects increases click-through rates by nearly 3x
- Utilize various send times, subject lines, etc. for performance data that can be used to improve future tactics
- Utilize A/B split testing

Opportunities
- Add increased personalization to emails to increase engagement
- Improve design of automated (blog RSS emails/newsletters) emails to increase engagement
- Add contact info to signatures of individuals on personalized emails
- Utilize double opt-in email drips to allow uninterested parties to unsubscribe
- Remove all contacts imported from lists that have not signed themselves up for automated email blasts in order to avoid violating CAN-SPAM laws
- Increase usage of A/B split testing
- Analyze and understand spam's high-contribution to lead scoring

Scorecard Notes
- Several Smart CTAs have been set up and used in emails
- Smart fields have been used in forms, but very few and have only included 1-2 more questions for progressive profiling
- No smart content landing pages are currently being used

Best Practices
- Personalize content to your personas' needs in order to specifically tailor to each prospect's buying process on site pages, landing pages, CTAs and email messages

Opportunities
- Set up more smart CTAs with offers varying depending on lifecycle stage of visitor for blog sidebar CTA as well as for the slide-out CTAs
- Utilize smart content for landing pages and emails to customize content depending on list membership or lifecycle stage

Maximizing Your HubSpot ROI: Considerations

CONSIDERATIONS

HubSpot System Configuration
- Fully research and complete persona set up in your suite, including qualifying questions in all forms and build out progressive profiling
- Integrate a negative persona to have a clear understanding of who Previous client should not be working with
- Develop a keyword strategy off of your new content mission & strategy
- Expand the keyword set with additional relevant keywords based on your keyword strategy and propensity to rank and capture inbound traffic and visitors

Website Considerations
- Improve brand consistency on the website by establishing and implementing a consistent set of brand standards
- Review and reassess CTAs and their placement on the page to be perceived as less spammy
- Add case studies with examples of your work and testimonials – explore the use of customer story videos

Content Considerations
- Develop a content mission and a content strategy to follow that mission – what benefits does Previous Client's content provide to visitors and clients?
- Increase the amount of content produced and ensure that content is addressing each persona and their unique buying journey – focus on expanding awareness and consideration content